

Handling Disputes and Objections

Quick Reference Guide

To create Description Codes:

System Control menu 1 > Description codes > Description code

- Add special warning message to allow account access based on users' permissions
- Can be added to an account manually or only with a Smart code
- Can choose to have code duplicate on linked accounts

To add a warning message with Description Codes:

System Control 1 > System Parameters

- If one of the 10 Description Codes exist on an account (or within a linked group), the consumer's name displays in red on Account detail screen

To warn users when an account is presented:

Management Menu > Client Update > Page 7- Information to Be Displayed When Account is Presented

- Useful tool for any kind of messages (warning, general info)
- Updates "on-the-fly"

To remove several Description Codes simultaneously:

System Control menu 1 > Description codes > Description code group

To automate Description Codes:

Use to make decisions with Smart codes

- **System Control menu 1 > Smart codes**
- **System Control menu 1 > Smart codes > Page 6**
- (Multiple Description Codes) **System Control 1 > Smart Codes > Page 1 > ? Logic Page 2**

To create Close Codes:

- **System Control 1 > Close Codes**

Use to make decisions with Smart codes

- **System Control 1 > Smart Codes > Page 1**
- **System Control 1 > Smart Codes > Page 6 - Close Code for Existing Account**

To move and account from agent to supervisor:

- **System Control 1 > Smart Codes > Page 7- Change Worker**
- **System Control 1 > Smart Codes > Page 7- Change Owner**
- **System Control 1 > Smart Codes > Page 8**

To control disputed account by QCat:

- (Omit from Dialer) **System Control 2 > QCat > By Company**

Use to make decisions with Smart codes

- **System Control 1 > Smart Codes > Page 5 - Change QCat**
- **System Control 1 > Smart Codes > Page 8 - QCat Code**

To run report by client QCat:

- **Management menu > Account Processing Reports > Report to Client by QCAT Code**

Use to modify text in report

- **Management menu > Account Processing Reports > Update Text For Report To Client By QCat Code**